

APPENDIX A

1. Patent Application/Serial No.: 60/429,461
Title: EXPORTABLE REPORT TEMPLATES
Filed: 11/26/2002
Applicant: Intuit Inc.
Reference No: 37202/127001; 30010
2. Patent Application/Serial No.: 11/285,917
Title: DISPOSABLE TAX RETURN
PREPARATION DEVICE
Filed: 11/23/2005
Applicant: Intuit Inc.
Reel/Frame No.: 017281/0101
Reference No: 37202/147001; 30022
3. Patent Application/Serial No.: 10/932,632
Title: EXTERNALLY DEFINED
APPLICATION CONFIGURATION
Filed: 9/1/2004
Applicant: Intuit Inc.
Reel/Frame No.: 015765/0311
Reference No: 37202/137001; 30039

4. **Patent Application/Serial No.:** 10/821,774
Title: RECOVERY ACCESS TO SECURE DATA
Filed: 4/8/2004
Applicant: Intuit Inc.
Reel/Frame No.: 015214/0697
Reference No: 37202/136001; 40098
5. **Patent Application/Serial No.:** 60/630,812
Title: MODEL-DRIVEN TAX APPLICATION FRAMEWORK
Filed: 11/23/2004
Applicant: Intuit Inc.
Reference No: 37202/138001; 40127
6. **Patent Application/Serial No.:** 11/285,930
Title: MODEL-DRIVEN USER INTERVIEW
Filed: 11/23/2005
Applicant: Intuit Inc.
Reel/Frame No.: 017267/0343
Reference No: 37202/138002; 40127

7. Patent Application/Serial No.: 11/302,964
Title: USER INTERFACE FOR DISPLAYING
IMPORTED TAX DATA IN
ASSOCIATION WITH TAX LINE
ASSIGNMENTS
Filed: 12/13/2005
Applicant: Intuit Inc.
Reel/Frame No.: 017652/0143
Reference No: 37202/148001; 40153
8. Patent Application/Serial No.: 11/077,047
Title: SEARCH QUALITY DETECTION
Filed: 3/9/2005
Applicant: Intuit Inc.
Reel/Frame No.: 016387/0477
Reference No: 37202/100001; 40177
9. Patent Application/Serial No.: 11/123,475
Title: ESTIMATED TAX REMINDER AND
PAYMENT FACILITATION SERVICE
Filed: 5/5/2005
Applicant: Intuit Inc.
Reel/Frame No.: 016542/0549
Reference No: 37202/140001; 50239

10. Patent Application/Serial No.: 11/332,416
Title: USER INTERFACE FOR LENIENT
EXCEPTION FEEDBACK
Filed: 1/13/2006
Applicant: Intuit Inc.
Reel/Frame No.: 017523/0100
Reference No: 37202/149001; 50317
11. Patent Application/Serial No.: 11/270,910
Title: DATABASE SERVER DISCOVERY
USING A CONFIGURATION FILE
Filed: 11/10/2005
Applicant: Intuit Inc.
Reel/Frame No.: 017231/0128
Reference No: 37202/145001; 50328
12. Patent Application/Serial No.: 11/193,906
Title: INTELLIGENT RECOILATION OF
DATABASE TRANSFER ERRORS
Filed: 7/28/2005
Applicant: Intuit Inc.
Reel/Frame No.: 017162/0355
Reference No: 37202/141001; 50346

13. Patent Application/Serial No.: 11/218,769
Title: FILTERED LIST ASSISTED ELEMENT SELECTION
Filed: 9/2/2005
Applicant: Intuit Inc.
Reel/Frame No.: 017171/0536
Reference No: 37202/142001; 50362
14. Patent Application/Serial No.: 11/471,755
Title: THIRD-PARTY CUSTOMIZATION OF A CONFIGURATION FILE
Filed: 6/20/2006
Applicant: Intuit Inc.
Reel/Frame No.: 018007/0977
Reference No: 37202/155001; 50392
15. Patent Application/Serial No.: 11/388,641
Title: ACCOUNTING TRANSACTIONS BY LIST
Filed: 3/23/2006
Applicant: Intuit Inc.
Reel/Frame No.: 017729/0058
Reference No: 37202/153001; 50393

16. Patent Application/Serial No.: 11/374,946

Title: ANTI-FRAUD CHECK PRINTING

Filed: 3/13/2006

Applicant: Intuit Inc.

Reference No: 37202/150001; 50416

17. Patent Application/Serial No.: 11/424,924

Title: AUTOMATION OF PAYROLL TAX
FILINGS

Filed: 6/19/2006

Applicant: Intuit Inc.

Reel/Frame No.: 017806/0707

Reference No: 37202/154001; 50430

18. Patent Application/Serial No.: 11/386,228

Title: LINE TRIMMING AND ARROW HEAD
PLACEMENT ALGORITHM

Filed: 3/21/2006

Applicant: Intuit Inc.

Reel/Frame No.: 017725/0904

Reference No: 37202/151001; 60494

19. Patent Application/Serial No.: 11/386,581

Title: CONTEXTUAL ACCESS TO
WORKFLOW FUNCTIONALITY

Filed: 3/21/2006

Applicant: Intuit Inc.

Reel/Frame No.: 017723/0365

Reference No: 37202/152001; 60542

20. Patent Application/Serial No.: 10/392,993

Title: DATA COLLECTION AND
TRANSACTION INITIATION USING A
FINANCIAL MESSAGE PORTOCOL

Filed: 3/19/2003

Applicant: Intuit Inc.

Reference No: 37202/130001; 60790

21. Patent Application/Serial No.: 11/366,164

Title: DATABASE SERVER DISCOVERY
USING A CONFIGURATION FILE

Filed: 3/1/2006

Applicant: Intuit Inc.

Reel/Frame No.: 017231/0128

Reference No: 37202/145002; 60792

22. Patent Application/Serial No.: 11/366,775
Title: DATABASE SERVER DISCOVERY
USING A CONFIGURATION FILE
Filed: 3/1/2006
Applicant: Intuit Inc.
Reel/Frame No.: 017231/0128
Reference No: 37202/145003; 60793
23. Patent Application/Serial No.: 60/229,693
Title: AUTOMATED TAX RETURN WITH
UNIVERSAL DATA IMPORT
Filed: 9/1/2000
Applicant: Intuit Inc.
Reference No: 37202/118001; 60924
24. Patent Application/Serial No.: 11/278,945
Title: AUTOMATED TAX RETURN WITH
UNIVERSAL DATA IMPORT
Filed: 4/6/2006
Applicant: Intuit Inc.
Reel/Frame No.: 017455/0636
Reference No: 37202/118003; 60925

25. Patent Application/Serial No.: 09/892,223
Title: COLLECTING AND AGGREGATING
CREDITWORTHINESS DATA
Filed: 6/25/2001
Applicant: Intuit Inc.
Reel/Frame No.: 012215/0868
Reference No: 37202/122001; 990001
26. Patent Application/Serial No.: 09/957,643
Title: VENDOR COMPARISON,
ADVERTISING AND SWITCHING
Filed: 9/20/2001
Applicant: Intuit Inc.
Reel/Frame No.: 012525/0230
Reference No: 37202/101001; 990002
27. Patent Application/Serial No.: 09/935,205
Title: AUTOMATED TAX RETURN WITH
UNIVERSAL DATA IMPORT
Filed: 8/21/2001
Applicant: Intuit Inc.
Reel/Frame No.: 012549/0597
Reference No: 37202/118002; 990005

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28. Patent Application/Serial No.: 09/900,485

Title: AUTOMATED, USER SPECIFIC TAX
ANALYSIS OF INVESTMENT
TRANSACTIONS USING A
PERSONAL TAX PROFILE

Filed: 7/6/2001

Applicant: Intuit Inc.

Reel/Frame No.: 012548/0111

Reference No: 37202/102001; 990006

29. Patent Application/Serial No.: 09/428,284

Title: MULTIPLE EXCHANGE RATE
TRACKING IN A FINANCIAL
TRANSACTION MANAGER

Filed: 10/27/1999

Applicant: Intuit Inc.

Reel/Frame No.: 010978/0371

Reference No: 37202/117001; 990008

30. Patent Application/Serial No.: 09/390,138

Patent No.: 6,446,048

Title: WEB-BASED ENTRY OF FINANCIAL
TRANSACTION INFORMATION AND
SUBSEQUENT DOWNLOAD OF SUCH
INFORMATION

Filed: 9/3/1999

Applicant: Intuit Inc.

Reel/Frame No.: 010414/0228

Reference No: 37202/114001; 990009

31. Patent Application/Serial No.: 09/395,867
Patent No.: 6,411,938
Title: CLIENT-SERVER ONLINE PAYROLL
PROCESSING
Filed: 9/14/1999
Applicant: Intuit Inc.
Reel/Frame No.: 010379/0248
Reference No: 37202/115001; 990010
32. Patent Application/Serial No.: 09/541,363
Title: AUTOMATED ON-LINE PORTFOLIO
GENERATION
Filed: 3/31/2000
Applicant: Intuit Inc.
Reel/Frame No.: 010718/0356
Reference No: 37202/103001; 990011
33. Patent Application/Serial No.: 09/534,201
Title: RECONCILING COMBINATIONS OF
TRANSACTIONS
Filed: 3/24/2000
Applicant: Intuit Inc.
Reel/Frame No.: 010699/0849
Reference No: 37202/119001; 990012

34. Patent Application/Serial No.: 60/260,011
Title: SOFTWARE MARKETPLACE WITH
LOW BARRIERS TO ENTRY
Filed: 1/5/2001
Applicant: Intuit Inc.
Reference No: 37202/120001; 990014
35. Patent Application/Serial No.: 09/755,934
Title: METHOD AND SYSTEM FOR
REMOTELY MANAGING BUSINESS
AND EMPLOYEE ADMINISTRATION
FUNCTIONS
Filed: 1/4/2001
Applicant: Intuit Inc.
Reel/Frame No.: 013590/0090
Reference No: 37202/107001; 990015
36. Patent Application/Serial No.: 10/029,765
Patent No.: 7,117,529
Title: IDENTIFICATION AND
AUTHENTICATION MANAGEMENT
Filed: 10/22/2001
Applicant: Intuit Inc.
Reel/Frame No.: 017171/0536
Reference No: 37202/124001; 990016

37. Patent Application/Serial No.: 07/954,335
Patent No.: 5,423,033
Title: REPORT GENERATION SYSTEM AND METHOD
Filed: 9/30/1992
Applicant: Intuit Inc.
Reel/Frame No.: 06360/0855
Reference No: 37202/110001; 990017
38. Patent Application/Serial No.: 08/275,038
Patent No.: 5,842,185
Title: METHOD AND SYSTEM FOR ELECTRONICALLY TRACKING FINANCIAL TRANSACTIONS
Filed: 7/14/1994
Applicant: Intuit Inc.
Reel/Frame No.: 6507/0980
Reference No: 37202/104002; 990018
39. Patent Application/Serial No.: 08/019,468
Title: METHOD AND SYSTEM FOR ELECTRONICALLY TRACKING FINANCIAL TRANSACTIONS
Filed: 2/18/1993
Applicant: Intuit Inc.
Reel/Frame No.: 06507/0980
Reference No: 37202/104001; 990018

40. Patent Application/Serial No.: 08/869,580

Patent No.: 5,903,881

Title: PERSONAL ONLINE BANKING WITH
INTEGRATED ONLINE STATEMENT
AND CHECKBOOK USER INTERFACE

Filed: 6/5/1997

Applicant: Intuit Inc.

Reel/Frame No.: 8997/0587

Reference No: 37202/112001; 990019

41. Patent Application/Serial No.: 08/252,670

Patent No.: 5,649,115

Title: TRACKING METHOD AND
APPARATUS

Filed: 6/2/1994

Applicant: Intuit Inc.

Reel/Frame No.: 07038/0311

Reference No: 37202/111001; 990020

42. Patent Application/Serial No.: 07/424,006

Patent No.: 5,134,564

Title: COMPUTER AIDED
RECONCILIATION METHOD AND
APPARATUS

Filed: 10/19/1989

Applicant: Intuit Inc.

Reel/Frame No.: 05210/0435

Reference No: 37202/108001; 990021

43. Patent Application/Serial No.: 07/816,892
Patent No.: 5,471,575
Title: INTERACTIVE PARAMETER DRIVEN
ITERATIVE FINANCIAL
SPREADSHEET ANALYSIS WITH
CONTEXT AND LAYOUT SENSITIVE
HELP SCREEN
Filed: 1/3/1992
Applicant: Intuit Inc.
Reel/Frame No.: 07863/0739, 05980/0406
Reference No: 37202/109001; 990023
44. Patent Application/Serial No.: 10/235,896
Title: AUTOMATED RETRIEVAL,
EVALUATION, AND PRESENTATION
OF CONTEXT-SENSITIVE USER
SUPPORT
Filed: 9/4/2002
Applicant: Intuit Inc.
Reel/Frame No.: 013575/0951
Reference No: 37202/105001; 990031
45. Patent Application/Serial No.: 10/099,043
Title: CASH GENERATION FROM
PORTFOLIO DISPOSITION USING
GENETIC ALGORITHMS
Filed: 3/14/2002
Applicant: Intuit Inc.
Reel/Frame No.: 012709/0890
Reference No: 37202/125001; 990032

46. Patent Application/Serial No.: 09/684,547

Patent No.: 6,745,196

Title: METHOD AND APPARATUS FOR
MAPPING A COMMUNITY THROUGH
USER INTERACTIONS ON A
COMPUTER NETWORK

Filed: 10/6/2000

Applicant: Intuit Inc.

Reel/Frame No.: 012709/0890

Reference No: 37202/116002; 990033

47. Patent Application/Serial No.: 60/158,314

Title: METHOD AND APPARATUS FOR
MAPPING A COMMUNITY THROUGH
USER INTERACTIONS ON A
COMPUTER NETWORK

Filed: 10/8/1999

Applicant: Intuit Inc.

Reference No: 37202/116001; 990033

48. Patent Application/Serial No.: 10/105,602

Title: WEB-BASED ENTRY OF FINANCIAL
TRANSACTION INFORMATION AND
SUBSEQUENT DOWNLOAD OF SUCH
INFORMATION

Filed: 3/21/2002

Applicant: Intuit Inc.

Reference No: 37202/114002; 990035

49. Patent Application/Serial No.: 10/236,332

Title: AUTOMATED GENERATION AND
DISPLAY OF REPORT RELATED TO
PROSPECTIVE TRANSACTION

Filed: 9/5/2002

Applicant: Intuit Inc.

Reel/Frame No.: 013275/0517

Reference No: 37202/113001; 990036

50. Patent Application/Serial No.: 10/349,700

Patent No.: 7,124,105

Title: CASH FLOW OPTIMIZATION USING
A GENETIC ALGORITHM

Filed: 1/22/2003

Applicant: Intuit Inc.

Reel/Frame No.: 013709/0369

Reference No: 37202/128001; 990037

51. Patent Application/Serial No.: 60/608,035

Title: MY TAX HISTORY

Filed: 9/7/2004

Applicant: Intuit Inc.

Reference No: 37202/143001; 990039

52. Patent Application/Serial No.: 10/360,319

Title: UNIVERSAL PART NUMBERING
SYSTEM

Filed: 2/6/2003

Applicant: Intuit Inc.

Reel/Frame No.: 013815/0409

Reference No: 37202/129001; 990043

53. Patent Application/Serial No.: 10/194,183

Title: INDIVIDUALIZED ANALYSIS AND
PROPOSALS FOR FINANCE
MANAGEMENT APPLICATIONS

Filed: 7/12/2002

Applicant: Intuit Inc.

Reel/Frame No.: 013500/0055

Reference No: 37202/126001; 990045

54. Patent Application/Serial No.: 10/722,118

Title: EXPORTABLE REPORT TEMPLATES

Filed: 11/24/2003

Applicant: Intuit Inc.

Reel/Frame No.: 014684/0803

Reference No: 37202/127002; 990050

55. Patent Application/Serial No.: 60/317,552

Title: CONTEXT-SENSITIVE USER-
SUPPORTED DATABASE

Filed: 9/5/2001

Applicant: Intuit Inc.

Reel/Frame No.: 012427/0164

Reference No: 37202/123001; 990052

56. Patent Application/Serial No.: 10/667,090

Title: LOAN ASSISTANT

Filed: 9/18/2003

Applicant: Intuit Inc.

Reel/Frame No.: 014322/0635

Reference No: 37202/131001; 990056

57. Patent Application/Serial No.: 10/753,756

Title: AUTOMATING SETUP OF A USER'S
FINANCIAL MANAGEMENT
APPLICATION ACCOUNT FOR
ELECTRONIC TRANSFER OF DATA
WITH A FINANCIAL INSTITUTION

Filed: 1/7/2004

Applicant: Intuit Inc.

Reel/Frame No.: 014752/0362

Reference No: 37202/133001; 990058

58. Patent Application/Serial No.: 10/692,702

Title: EDITABLE HYPERTEXT CONTROL

Filed: 10/24/2003

Applicant: Intuit Inc.

Reference No: 37202/132001; 990060

59. Patent Application/Serial No.: 11/104,049

Title: PORTFOLIO PERFORMANCE
TRACKING

Filed: 4/11/2005

Applicant: Intuit Inc.

Reel/Frame No.: 016476/0204

Reference No: 37202/139001; 990061

60. Patent Application/Serial No.: 10/756,736
Title: METHOD AND SYSTEM FOR
BACKFILLING TRANSACTIONS IN
AN ACCOUNT
Filed: 1/12/2004
Applicant: Intuit Inc.
Reel/Frame No.: 014888/0340
Reference No: 37202/134001; 990064
61. Patent Application/Serial No.: 60/559,169
Title: MISSING DATA COLLECTION
Filed: 4/1/2004
Applicant: Intuit Inc.
Reference No: 37202/135001; 990067-PRV
62. Patent Application/Serial No.: 10/982,661
Title: AUTOMATED DATA RETRIEVAL
Filed: 11/4/2004
Applicant: Intuit Inc.
Reel/Frame No.: 015877/0657
Reference No: 37202/135002; 990067
63. Patent Application/Serial No.: 10/916,668
Title: BILL PAYMENT OPTIMIZATION
USING A GENETIC ALGORITHM
Filed: 8/11/2004
Applicant: Intuit Inc.
Reel/Frame No.: 015708/0459
Reference No: 37202/128002; 990068

64. Patent Application/Serial No.: 10/856,646

Patent No.: 6,963,879

Title: METHOD AND APPARATUS FOR
MAPPING A COMMUNITY THROUGH
USER INTERACTIONS ON A
COMPUTER NETWORK

Filed: 5/27/2004

Applicant: Intuit Inc.

Reel/Frame No.: 016542/0549

Reference No: 37202/116003; 990073

65. Patent Application/Serial No.: 11/264,368

Title: STORING ON A CLIENT DEVICE
DATA PROVIDED BY A USER TO AN
ONLINE APPLICATION

Filed: 10/31/2005

Applicant: Intuit Inc.

Reel/Frame No.: 017484/0244

Reference No: 37202/144001; 990075

66. Patent Application/Serial No.: 11/036,269

Title: PROACTIVE TAX PREPARATION

Filed: 1/13/2005

Applicant: Intuit Inc.

Reel/Frame No.: 016193/0311

Reference No: 37202/135003; 990078

67. Patent Application/Serial No.: 09/805,321

Title: SYSTEM AND METHOD FOR
TRACKING CHARITABLE
DEDUCTIONS

Filed: 3/13/2001

Applicant: Intuit Inc.

Reference No: 37202/121001; 990081

68. Patent Application/Serial No.: 11/222,026

Title: PREDICTIVE TAX PREPARATION

Filed: 9/7/2005

Applicant: Intuit Inc.

Reel/Frame No.: 016743/0935

Reference No: 37202/143002; 990083

69. Patent Application/Serial No.: 11/283,560

Title: QUANTITY AVAILABILITY FOR
INVENTORY ITEMS

Filed: 11/17/2005

Applicant: Intuit Inc.

Reel/Frame No.: 017272/0630

Reference No: 37202/146001; 990086

70. Patent Application/Serial No.: 09/662,233

Title: DYNAMICALLY RESIZEABLE
DISPLAY ELEMENTS

Filed: 9/14/2000

Applicant: Intuit Inc.

Reel/Frame No.: 011104/0724

Reference No: 37202/078001; 990087

71. Patent Application/Serial No.: 09/580,670

Title: MANAGING MULTIPLE LIFE CYCLE
PLANS

Filed: 5/26/2000

Applicant: Intuit Inc.

Reel/Frame No.: 011254/0220

Reference No: 37202/099001; 990088

72. Patent Application/Serial No.: 11/534,532

Title: FLOW CONTROL INFORMATION
FOR A MODEL-DRIVEN USER
INTERVIEW

Filed: 9/22/2006

Applicant: Intuit Inc.

Reel/Frame No.: 18344/0198

Reference No: 37202/138003; 060909

73. Patent Application/Serial No.: 11/534,540
Title: PROMPTS FOR A MODEL-DRIVEN
USER INTERVIEW
Filed: 9/22/2006
Applicant: Intuit Inc.
Reel/Frame No.: 18344/0198
Reference No: 37202/138004; 060910
74. Patent Application/Serial No.: 11/534,544
Title: USER INTERFACE FOR A MODEL-
DRIVEN USER INTERVIEW
Filed: 9/22/2006
Applicant: Intuit Inc.
Reel/Frame No.: 18344/0198
Reference No: 37202/138005; 060911
75. Patent Application/Serial No.: 11/534,554
Title: USING AN INSTANTIATED MODEL
TO GENERATE AN APPLICATION-
SPECIFIC DOCUMENT
Filed: 9/22/2006
Applicant: Intuit Inc.
Reel/Frame No.: 018344/0198
Reference No: 37202/138006; 060912

76. Patent Application/Serial No.: 11/479,197

Title: PUSH DEBIT/CREDIT PAYMENTS TO BILLERS

Filed: 6/29/2006

Applicant: Intuit Inc.

Reel/Frame No.: 018032/0614

Reference No: 37202/156001; 60540

77. Patent Application/Serial No.: 60/516,663

Title: INTERNET ENHANCED SHOPPING SYSTEM

Filed: 10/31/2003

Applicant: Intuit Inc.

Reference No: 37202/075001; 071364

78. Patent Application/Serial No.: 10/651,921

Title: METHOD OF AND APPARATUS FOR PERFORMING A DATA TRANSFER OPERATION BY MONITORING CONDITIONS DURING THE TRANSFER AND DYNAMICALLY ADJUSTING PARAMETERS CONTROLLING THE TRANSFER

Filed: 8/29/2003

Applicant: Intuit Inc.

Reel/Frame No.: 014838/0303

Reference No: 37202/095001; 061245